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ABSTRACT

Most people want to learn, grow and achieve their career dreams. Linking individuals' career aspirations to organizational goals can be challenging, yet it is the foundation for personal and organizational success. This chapter discusses how to use learning objectives to link career learning or development to organizational strategy. Using a Health Services Organization as an example, the chapter provides a step by step process for the preparation of learning plans that link to the organizational strategy, and can be used effectively for measuring results. (GCP)

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Tying Individual Dreams to Organizational Goals

by

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Tying Individual Dreams to Organizational Goals

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Introduction

Most people want to learn, grow and achieve their career dreams. Linking individuals' career aspirations to organizational goals can be tricky, yet it is the foundation for personal and organizational success. In this paper you will learn how to use learning objectives to link career learning or development to organizational strategy.

Participants will learn the method of preparing learning objectives as a tool for ongoing personal, career and professional development.

We use a health care organization as a demonstration where all employees engaged in the development of their personal learning plans that were subsequently incorporated into the development of the organization-wide learning plan.

Purpose

The specific learning objectives are:

- To be able to write learning objectives that are linked to organizational goals
- To learn how to develop well-defined objectives
- To learn how to measure and track learning objectives

Background

In today's highly competitive and global marketplace, many companies are investing significant efforts to engage employees to be aligned to the mission and values of the organization. Companies creating this alignment through systemic change are moving toward becoming a Learning Organization (Peter Senge).

As companies are an organized system, there are several challenges that they face in gaining alignment:

- increasing decentralization in an effort for employees to be closer to the customer;
- increasing diversity as members of the workforce bring differentiated values and cultures to the workplace;
- and new ways of working – work-at-home; tele-commuting; flextime; crossing time zones, to name several.

With systemic change initiatives, employees can be uncertain as to the goals and direction of the organization. The challenge for the leadership is to: create a sense of shared understanding of the organizations' purpose – vision, mission, goals and strategies, and ensure the employees are developing and contributing to the success of the organization. To achieve this, the human resource system needs to focus on learning & development, and career planning to build competencies, and alignment to the organizational strategy – the Strategic Plan.

As a core component of the Strategic Plan in an organization, many incorporate an Organizational Learning Strategy. Once a direction is set, each division or department develops their annual goals linked to the overall Strategic Plan. Having organizational goals established, a process is employed whereby members of the departments -- employees – establish their personal learning goals in keeping with the Strategic Plan. These personal learning goals are "rolled-up" into a divisional, departmental, and organization-wide Learning Strategy.

An Organizational Learning Strategy has two significant components:

- Learning and Development which is frequently defined as a continuous, lifelong process in which you acquire or enhance the competencies – skills, knowledge, behaviors and values that are important to your job, professional career, and personal growth, and
- Career Planning which is defined as a deliberate process in which you identify your personal career-related goals, based upon an assessment and examination of your interests, preferences, values, competencies, skills, and motivation to establish a plan to achieve goals [1].

The benefits accrued to both individuals' and organizations' are significant, such as:

- increased targeted spending on training and development – reducing "wasted" training that is not connected to achievement of organizational goals;
- increased awareness of what it takes to be successful in the organization by all employees;
- increased engagement in organizational community building; increased retention;
- targeted investment in learning with the capability of measuring return on investment and shareholder contribution, to name several.

Alignment with strategy that incorporates learning is creating a new work environment – a new employment contract. This means that employees must not get lulled into a false sense of security or dependence on the organization to "look after" their careers for them. This new employment contract – being self-directed - is characterized by:

- no longer being able to rely on day-to-day workplace experience to ensure that the right skills and competencies are in place for future needs,
- relying on a one-time education attainment, without additional formal learning, is no longer sufficient to maintain a position,
- the fact that companies can no longer be expected to provide all the training & development or resources needed to ensure the best skills and competency inventory is developed for the present or future of the organization.

It is therefore, incumbent upon employees to ensure they develop their skills and capabilities to keep themselves marketable for both internal and external opportunities.

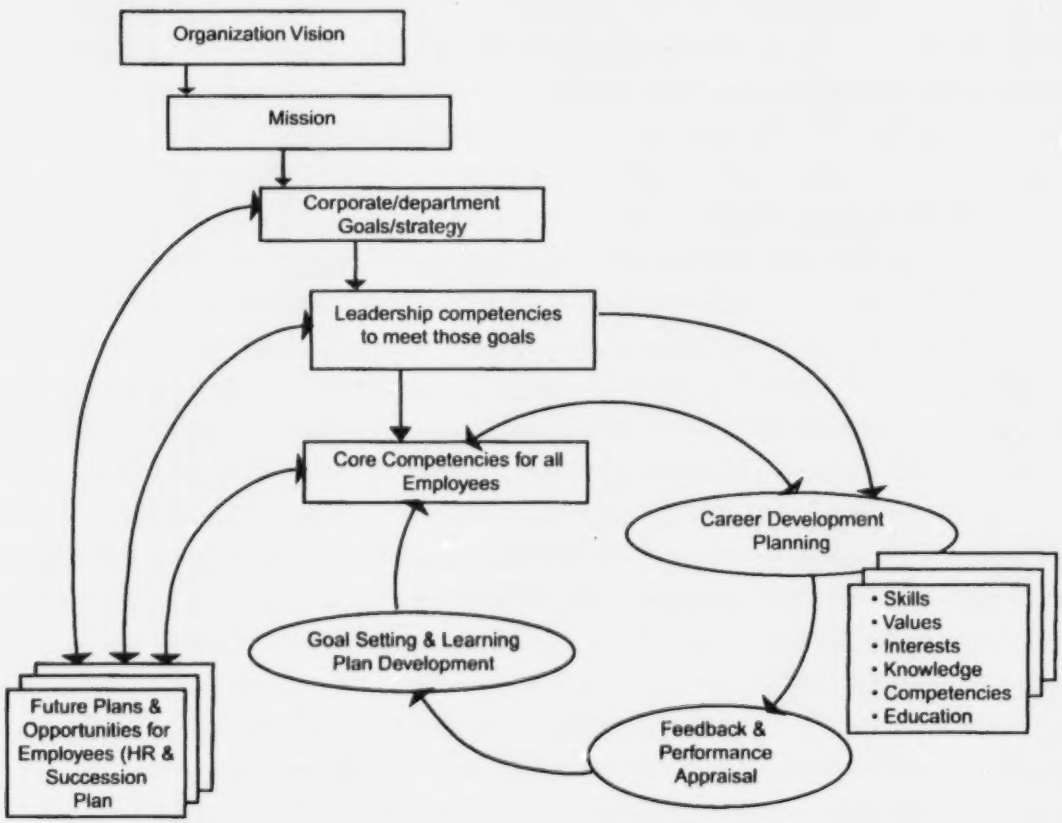
Employees need to regularly monitor and maintain skills, supplement employer-provided training with their own understanding of the trends and needs of future work requirements, and develop their own desires. With these issues in mind, we present a means of creating the learning plan module of a career planning process.

To engage employees to be aligned to strategy, they need coaxing and learning tools to assist them with the transition.

This paper demonstrates the process by which employees develop their Personal Learning Plan linked to the Strategy of the organization.

We provide an adaptation of a learning tool provided to the employees of a Health Services Organization. Our focus is to provide some context, as well as the process for the development of learning objectives, and two examples of objectives created by employees.

Learning Plan System within an Organization



Health Services Organization – Context:

In getting started, the Health Services Organization needed to set the context for the ensuing organizational development effort. Traditonally, employees took minimal responsiblility for their personal performance management or learning plan development. In an effort to transform into a "learning organization", employees were asked to engage in a process by which they developed their performance objectives and learning plan for the year. Given the significant change initiated in the organization, employees were asked to attend a workshop to assist them with how to construct learning objectives.

Here, we provide the process employed for introducing and engaging employees in the component – *Preparing Your Learning Plan*.

Adapted Introductory Remarks:

There are many issues and changes that will continue to impact the provision of health serivces in the years to come. To meet these challenges, the Health Services Organization has embarked on a process of becoming a learning organization.

In order to meet current and future challenges, employees will need to develop the capacity to manage and respond effectively to changing situations and conditions to meet the needs of our valued customers. The most important factor in responding effectively to change is the ability to learn. The ability to learn on an ongoing basis, and to look for and use opportunities for continuous growth is a required skill for success in our work environment. To that end, each employee is to prepare their own learning strategy.

There are three key questions addressed by a learning strategy:

- What are our business requirements?
- What are the tasks that need to be performed to meet the business requirements?
- What are the skills/abilities/competencies needed to perform the tasks to meet the business requirements?

Business Strategy:

The Health Services Organization established the following core strategies to achieve its core business:

- Ensure an appropriate supply and distribution of health professionals to meet the needs of the populations served
- Better co-ordination and utilization of services, initiatives and planning functions
- Expand and strengthen community services
- Anticipate and develop services to meet the needs of a growing and aging population
- Enhance the use of information and information technology to improve decision making in the delivery of health services

Resourcing the Employees:

A tool kit of resources was provided to the employees to assist them with the change initiative. Tools included: Competency models and dictionary of definitions of core competencies; performance planning forms and working materials; career assessment tools; Learning Planning development tools and process guidelines.

The Components of the Learning Plan

Step 1: Conduct a Personal Career Assessment:

An Exploration of Self includes an examination of both personal and work history - in essence, an exploration of the things you do that you feel proud of. This includes past accomplishments, strengths, well-honed skills and competencies, interests and learning style awareness. In this section you will describe significant learning experiences:

- Did these experiences use your strong skills or were you required to learn new things?
- Did you choose the experiences or did others choose them for you?
- Did you learn by doing something differently than in the past?

You will also explore areas that you believe to be weak or difficult to manage, as these can be explored as opportunities for development.

Step 2: Review Needs of the Organization:

What are the needs of the organization? What are the significant issues/factors/trends influencing the future of the organization. How will these issues impact changing needs or the service provider's direction? What are some of the needs of your department or area? What are the skills and competencies needed over the next 1-2 years to help meet the goals?

Step 3: Where am I going? Defining the Career goals:

Looking forward, where am I headed? What kind of person do I want to be, what do I want to be able to do? What kind of skills, competencies, knowledge will I need to gain? What positions in the organization would employ my skills competencies, knowledge, and interests? Are there required steps or qualifications needed for people in those positions.

Step 4: How do I get there from here – Creating a Learning Plan:

What do I want and need to learn on the path to attaining my goals? How will I assess my learning achievements? What measures can I use (or do I need) to assess myself? What feedback do I need from my supervisor or manager to support my learning plan? What activities can I participate in that will help me learn?

Step 5: Follow-up and Re-evaluate:

A quarterly review of progress on the learning plan activities is highly recommended. As employees will continue their learning efforts within the context of their work, we recommend limiting learning objectives to those that can be reasonably achieved in reasonable timeframes. For some individuals, that may be 1 learning objective with completion targets in 6 weeks. For others, 3-learning objectives within 6 months, or perhaps even a long-term journey. It is important to reflect on external influencing factors that both enhance or limit learning opportunities and subsequently re-set goals.

The learning plan has 5 parts:

- **The objective – what do I need to know? How important or urgent – what is the priority for development:**

  A title – this may include technical skills development, competency development, skills or aptitudes.

- **Define the Objective (A.C.T.): - Details on what I need to know**

  Provides clarity on the objective selected; the objective is to include:
  - specific **action**
  - **criterion** to be achieved
  - **terms** under which the action will occur

  Well-drafted objectives may also provide context or background of the current state of the skill or behaviour.

- **How will I learn it?**

  Provides detail of how the learning will be achieved using quantifiable actions, conditions and standards. What will you do or say? Where and when will this happen? How will you measure success? What is your time frame? Is this attainable and realistic? Steps are to be identified where the learning process requires practice and feedback prior to moving forward to the next step.

- **How will I know I have learned it?**

  Describe specific behaviour outcome which would indicate that the learning has taken place and been integrated into a normal pattern of behaviour recognized by the self and others.

- **How does it help my performance?**

  Identify how this learning will enhance or contribute to the organization/your team/or work area. How will I share my learning with others?

Example #1: Presenting My Ideas

1) **The objective – What do I need to Know?:**
My ability to present my ideas and to persuade others to do things differently

2) **Define the Objective (ACT) – Details on What I Need to Know?:**
Currently I send an email to my manager on an idea of how to make a process more efficient, and I get no response. I would like to be better prepared, have a clearer understanding of what is important in my area so that when I **present an idea (*action*) to be given serious consideration, acknowledged and implemented within a year (*criterion to be achieved),* in a personal meeting with my manager or supervisor (*terms*).**

3) **How Will I Learn It?:**
- Find and observe people who are good at getting their ideas accepted (within 1 month)
- Model the observed people who are good at getting their ideas accepted (3 months)
- Ask my peers for feedback on my ability to gain support for my ideas (within 1 month)
- Keep a log of situations where I attempted to persuade someone to my idea and analyze what could have been done differently (ongoing)
- Sign-up for a presentation skills course with "the learning annex" for a Saturday (in the next 3 months)
- Volunteer on the annual fundraising committee (September)
- Read a book on "selling ideas" (summer)

4) **How will I know I Learned It?:**
I am well prepared for a meeting, having thought through all the needs of the audience, especially my boss, and my ideas are acknowledged, accepted or implemented within a year.

5) **How Does It help my Performance?:**
Increased customer service, as I will be able to understand their needs and handle objections more effectively. I have lots of ideas of how to make things more efficient which would be helpful in my area.

Example #2: Negotiating Skills (Professional/Managerial Level)

1) **The Objective: What do I need to Know?**
Enhance Negotiation Skills

2) **Define the Objective (ACT) - Details on What I Need to Know?**
To negotiate win-win solutions with multiple stakeholders and interested groups *(action),* within 2 weeks of identifying the needed *change (criterion),* to achieve consensus on

implementing a strategy to change a current business process *(terms).* Context: it currently requires the support of senior management to make a business process change, and months of effort which affects the morale of the department, lowers productivity and delivery targets are missed.

3) **How I will learn It?**
   - Identify an internal mentor for relationship building skills – within 1 month
   - Meet with all stakeholders and interested groups over the course of the next 3 months with the specific intent to identify key issues impacting their part of the business process
   - Identify the core values and supporting behaviours of each stakeholder group within 3 months
   - Identify core needs of each group, and core needs of the key people in each group – within 3 months
   - Attend course on "interest based negotiation skills" within 4-6 months
   - Participate in sales/purchasing meetings to see negotiations in action as a learning process, within the next month
   - Practice interest based negotiations on change initiatives – reducing time to implementation by 50% at the 1/2 way point (5 months from today)

4) **How will I know I have Learned It?**
   - Serve as an effective model to others in negotiating for change in business processes
   - Am able to develop consensus on business/policy change within 2 weeks of identified change
   - Established credibility among peers & superiors as an effective negotiator

5) **How does it help my performance?**
   - Increase effectiveness of implementing change in service delivery
   - Increased productivity contributing to the reduces time/hours to deliver services
   - Increases quality of business services through increased flexibility, faster response time and closer connections to outcomes

Conclusion

As working people increasingly become self-directed in organizations, they are contributing to changing the work culture and employment contract with their employers. Leaders of organizations see the value and importance of engaging people and aligning their efforts to the strategy of the organization. With increasing self-direction, the role of career development and management become a fundamental part of the process of linking learning and development to the organizational strategy. The benefits to both employee and the organization are significant as training and development becomes more focused on the matched needs of employee and organization. Employees who develop in meaningful ways, increase their productivity, satisfaction, and ultimately there is a "return on the investment" for everyone.

Summary of the Contents

This paper presents a method for employees to create learning plans that link with the organization's strategic direction. Using a Health Services Organization as an example, the writer provided a step by step process for the preparation of learning plans that link to the organizational strategy, and can be used effectively for measuring results – to gain a Return on Investment.

There are three key questions addressed by a learning plan:

- What are our business requirements
- What are the tasks that need to be performance to meet the business requirements
- What are the skills/abilities/competencies needed to perform the tasks to meet the business requirements

Employees set the stage of their career review with a depth assessment of their personal performance:

- Do I have the skills/knowledge/competencies needed to do the job effectively
- If I don't have the level of skill I need to do the job well, what skills/knowledge/competencies do I need to learn and develop to do the job effectively, and
- What do I need to do/learn/practice to grow within my job or to prepare me for the next opportunity

Steps to creating a Learning Plan:

Step 1: Conduct a Personal Career Assessment
Step 2: Review Needs of the Organization
Step 3: Where am I going? Defining the Career Goals
Step 4: How do I get there from here? Creating a Learning Plan
Step 5: Follow-up and Reevaluate

The learning plan has 5 - parts:

1. The objective – what do I need to know? How important or urgent – what is the priority for development:

2. Define the Objective (**ACT**) - Details on what I need to know:
   Action
   Criterion to be achieved
   Terms under which the action will occur

3. How will I learn it?

4. How will I know I have learned it?

5. How does it help my performance?

Care in drafting effective learning objectives leads to higher levels of personal satisfaction and contribution to the organization. The benefits to both employee and the organization are significant as training and development becomes more focused on the matched needs of employee and organization. Employees who develop in meaningful ways, increase their productivity, satisfaction, and ultimately there is a "return on the investment" for everyone.

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Notes

[1] London, Manuel. (ed.). (1995). *Employees, Careers, and Job Creation, Developing Growth-Oriented Human Resources Strategies and Programs* Jossey-Bass Inc., page 83.

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